



Sponsored by Kansas City Chapter AGA



# The Kansas City Courier

February, 2012

## INSIDE THIS ISSUE:

AGA Meeting	2
Kansas City Chapter	
Membership News	3
Awards and Scholarship Opportunities	4
Community Service	5
CGFM Happenings	6
Minutes to the Chapter Executive Committee (CEC) Quarterly Meeting- January 11, 2012	7-8
December Treasurers Report	9
Chapter Executive Committee-Program Year 2011-2012	10

## PRESIDENT'S MESSAGE

# Success Matters



President's Message – February 2012

One thing that I love about AGA is the opportunity to exercise my leadership skills (or lack of) in a safe and supportive environment. I have been fortunate as the President to have an excellent team helping to run the Kansas City Chapter. Getting involved in AGA is a great opportunity to learn by observing successful leaders from multiple agencies and types of government. We have members from Federal, County and

City governments that are active members of our Chapter. So, I encourage all members to get involved in AGA and to volunteer to lead a committee, help run a seminar, support the community and reach out to other accounting professionals.

On Saturday, January 21, the Kansas City Chapter sponsored the AGA Midwest Region – Sectional Leadership Meeting –Regional (SLMR). The theme was “Lead for Success.” It was a great opportunity for the Chapter leadership to meet the Regional team and their counterparts in the other Chapters in the region. Thanks to all the Chapter Executive Committee (CEC) members that helped set up and kudos to Laura, Connie, Leeanna and Chuck (the Chapter tech support guy) for running a successful meeting.

We had an awesome January luncheon with 52 attendees and an informative presentation on “Money Laundering in Serbia.” Our next luncheon is our annual training on “Recent Tax Changes for 2011” on Wednesday, February 15 at Jack Stack Bar-B-Que at the Freight House District. One CPE for taxation will be awarded.

Mark your calendar:

- March 31<sup>st</sup> Harvesters Food Drive and Volunteer Day@ Harvesters
- April 19<sup>th</sup> KC Chapter – Spring Seminar at JCCC
- July 29<sup>th</sup> – August 1<sup>st</sup> AGA PDC 2012, San Diego, CA

Mike Melloy  
KC Chapter President  
<http://www.kcaga-cgfm.org/>

## AGA Meeting-February

### Meeting & Luncheon Information-February 15, 2012, Wednesday 11:30 A.M. (SOLD OUT)

- Honored Speaker: Becky Wigington  
H&R Block
- Subject: Recent Tax Changes for 2011  
(1 CPE-Taxation)
- Location: Jack Stack Bar-B-Que  
101 W. 22nd Street, Kansas City, Missouri, 64108 – Freight House District
- Cost: \$15.00 Members  
\$20.00 Non-Members
- Reservations: Please call Connie Smith 816-926-3646 or e-mail [constance.smith@kcc.usda.gov](mailto:constance.smith@kcc.usda.gov). Reservations need to be made before 4:00 P.M. Wednesday, February 8th, 2012. The meeting has been sold out as of the printing of this newsletter. Connie Smith can put individuals on a waiting list in the event of a cancelation.

### Upcoming Chapter Events

Mark your calendars for April 19, 2012. The AGA Kansas City Chapter will be holding its Spring Seminar at Johnson County Community College. This will be an all day event, 8 CPEs are available. More information will be sent to all members once the speakers and schedules are finalized.

### Audio Conferences

February 8, 2012

The New Stewardship Imperative-Federal Financial Management at the Crossroads

2 CPE Hours

March 7, 2012

Data mining to Prioritize Investigations of Contract Fraud

2 CPE Hours

For more information on how to register, please see the national AGA Website at [www.agacgfm.org/homepage.aspx](http://www.agacgfm.org/homepage.aspx). Make sure you check the website for upcoming conferences providing additional CPEs and networking opportunities.



## AGA Kansas City Chapter Welcomes Our Newest Members!

Please help us extend a warm AGA Kansas City Chapter welcome to our newest members. We hope to see you soon at the upcoming luncheons and to take part in all of our planned activities. Again, welcome!

**Benjamin Hart, Allen Gibbs & Houlik**  
**Jackie L. Kellert, NAF - USAG Benelux**  
**April Gale Selfridge, Varney and Associates**

AGA members form a diverse group of individuals—from students to entry-level employees to senior executives and elected officials—working for local and state governments, school districts and retirement systems, colleges and universities, federal agencies and public accounting firms. With 90 chapters, there are numerous ways for you to become involved with other government financial management professionals. Whatever your role in government financial management, AGA offers a membership package tailored to meet your professional needs and interests.

### AGA Member Types

**Full Government Member** **\$90/year**

This class of membership requires three or more years of government experience, involving the professional performance of financial management activities in an operational, administrative and/or supervisory capacity. This class is also available to individuals with similar experience outside the government who are engaged in educational activities having the same objectives as the Association, or who have made a contribution to the improvement of government financial management.

**Private Sector Member** **\$150/year**

This class of membership is available to individuals working for commercial activities/ventures that are actively engaged in and support AGA's purpose and objectives.

**Early Career Member** **\$45/year**

This class of membership is for those who work in private or public sector jobs with less than three years of professional experience.

**Student Member** **\$30/year**

This class of membership is available to college/university students.

**Retired** **\$30/year**

This class of membership is available to those members who have retired. Call the AGA Customer Satisfaction Center at 800.AGA.7211 to find out more about our retired membership category.

**Important Notice:** It is time to start thinking about renewing your AGA membership if you are a current member. The due date is March 31, 2012 for the next year. This applies to all members regardless of your anniversary date. You can go to the AGA's website at [www.agacgfm.org](http://www.agacgfm.org) and pay online. You will need to sign in. The login is typically your AGA ID number and the password is typically your first initial and last name. The AGA Kansas City Chapter looks forward to seeing all of you for another year.

Please contact Barry Owens with any questions about membership, [barry.j.owens@us.pwc.com](mailto:barry.j.owens@us.pwc.com).

## Awards and Scholarship Opportunities

### Awards and Scholarship Opportunities

The Awards Chair needs 3 volunteers to sit on the Scholarship Committee. Please email [Michelle.Holland@jocogov.org](mailto:Michelle.Holland@jocogov.org) if you are interested in volunteering to assist in the selection of our KC AGA Scholarship. Please do not volunteer if you or one of your family members intends to apply for the scholarship.

Please see the information below regarding the KC AGA Scholarship Applications.

#### **DEADLINE**

Scholarship applications and required documentation must be received by the close of business, March 31st. No incomplete or late applications will be considered.

#### **TYPE AND ELIGIBILITY FOR SCHOLARSHIPS**

The Kansas City Chapter of Government Accountants (AGA) is pleased to offer:

Up to two \$500 academic scholarships for **full-time or part-time study**.

Must be an AGA member or family member (spouse, child or grandchild) and

Scholarship must be applied toward full-time or part-time undergraduate/graduate study in a financial management academic discipline.\*

\*This includes disciplines such as accounting, auditing, budgeting, economics, finance, electronic data processing (IT), information resources management, and public administration.

#### **CRITERIA FOR AWARD**

The Academic Scholarships will be awarded on the basis of the candidate's potential for making a meaningful contribution to public financial management. Academic achievement prior to application is an indication of potential for successful study, but is not the only criteria that will be considered in awarding these scholarships. Candidate must have a minimum grade point average of 2.5 on a 4.0 scale.

#### **LETTERS OF RECOMMENDATION**

All Academic Scholarship candidates must include a reference letter from an AGA member and from another professional such as a professor, guidance counselor, employer etc. written on professional letterhead and sent electronically.\*\*

\*\*All reference letters and letters of recommendation should be submitted electronically to the address in the cover letter for this application along with the application and essays.

#### **REQUIRED ESSAYS**

All scholarship candidates must submit an electronic word document of their essay and application to the address in the cover letter for this application. The essay cannot be more than two double-spaced pages. Make sure to have your full name on the document and specify what scholarship you are applying for. The essay should address the following topic: "Why I Want a Career in Financial Management."

If interested in applying, please request a scholarship packet via email to [Michelle.Holland@jocogov.org](mailto:Michelle.Holland@jocogov.org).

## Community Service-Harvesters

*"It is in giving  
that we  
receive."*

**-St. Francis of  
Assisi**



The AGA-KC Chapter will be volunteering at Harvesters on March 31, 2012. Make sure to mark your calendars. The service project will be 9:30-11:30AM. The address is for the Volunteer Outreach Center and we will be assisting in the warehouse at 3801 Topping, Kansas City, MO, 64129. If you plan to volunteer, please let Nancy Healy know at [healy.nancy@epa.gov](mailto:healy.nancy@epa.gov). Harvesters has the following recommendations to ensure our members safety.

- Wear closed-toed shoes, such as tennis shoes. Open-toed shoes are not allowed in the warehouse for safety reasons.
- Everyone must be six years old to volunteer. Unfortunately, they cannot accommodate any child under age six.
- Dress casually. Jeans, t-shirts, sweatshirts, etc. are recommended.
- Keep jewelry at a minimum to prevent snagging on boxes and equipment.
- Bring a water bottle to keep in the volunteer break room or there are water fountains located near the warehouse entrance.
- Leave all valuables in your car or at home (cell phones are not allowed in the warehouse).
- Overflow parking is available across the street from Harvesters if the main parking lot is full.
- Harvesters maintains a smoke-free campus, no smoking is allowed on premises.

**Inclement weather** - A decision if Harvesters will be open or closed during inclement weather will be made by 6 AM that day and an update will be left on the main line at 816-929-3000. If there is a question about weather related closings, please call before you depart to volunteer.

<http://www.harvesters.org/>

## CGFM Happenings



### CGFM Happenings:

- I. **Study Group:** If you are interested in participating in a study group to prepare for the CGFM exam, please contact Carla Kohler [kohler.carla@epa.gov](mailto:kohler.carla@epa.gov) or (913) 551-7900 for additional information.
- II. **Study Guides:** Kansas City Chapter has CGFM study guides for check out. Please contact Carla Kohler [kohler.carla@epa.gov](mailto:kohler.carla@epa.gov) or (913) 551-7900 for additional information.
- III. **Additional Resources:** Information is posted on the AGA website to assist in preparing you to take the CGFM exam. Please use the following website link: <http://www.agacgfm.org/cgfm/prepare/>.

### IV. CGFM Course 3 Offering in the Midwest Region

Course 3 will be held March 27 and 28, 2012 from 8 am to 4 pm at three locations in the Midwest Region. They are:

- 1) Des Moines at the State Library in the Ola Babcock Miller Building (1112 E Grand Ave, Des Moines, IA 50319 Room 310)
- 2) Jefferson City at the Harry S Truman Building on the Missouri State Capitol Complex (301 W High St., Jefferson City, MO 65101 Room 350) [Remote Site]
- 3) Council Bluffs at the Iowa School for the Deaf (3501 Harry Langdon Blvd, Council Bluffs, IA 51503 Building 12). [Remote Site]

The instructor, Tom O'Connor, will be at the Des Moines location. The cost is \$300 for any AGA member and \$375 for non-members for 16 CPE hours.

Registration will close March 6, but early registration is encouraged because we have a maximum number of participants (in total from all of the sites) of 35. The following is a link to the registration site. <http://cgfm3review2012midwest.eventbrite.com/>

## Chapter Executive Committee (CEC) Quarterly Meeting- January 11, 2012

In attendance were Michael Melloy, Oscar Williams, Rhonda Lucas, Mark Brandt, Nancy Healy, Harry Heflin, Leeanna Wilder, Barry Owens, Laura Logan, Connie Smith, Chuck Koelsch, Steven Bell, and Carrie Miller.

Meeting was opened by President Michael Melloy discussing the previous meeting minutes. The minutes of the previous meeting were approved.

### Website:

The website has been paid for an additional six months.

The website has been live for six months and the design will remain the same.

The goal is to keep consistency in appearance of the website for years to come.

### Publicity:

The chapter has added two free publicity outlets (u local and infoZine) to promote monthly luncheons, seminars, and community outreach events.

The goal is to utilize five free publicity sites by the end of the year.

Chuck will begin to post chapter event information on the AGA National Website. The chapter will receive points for events being posted on the chapter website.

### Sectional Leadership Meeting-Regional (SLM-R):

The SLM-R will be held on Saturday, January 21, 2012 from 10 a.m. to 4 p.m. at the Embassy Suites on the Plaza.

Those who attend the SLM-R will receive two CPE hours. It is a good practice to keep on file instructor bios, handouts, and certificates just in case of an audit.

Leeanna will make the CPE certificates and bring the name tags.

CEC members are encouraged to arrive at 9:00 am to help set up and welcome guests.

### CEC Members:

Harry will stay as Citizen-Centric Reporting Chair, but wants to find another board member for the Early Career Chair.

Leeanna wants to be the Early Careers Chair if a successor is found for the Professional Development-Seminar Coordinator.

Mike will send an email regarding CEC positions that need to be filled.

### By-Laws and Procedures:

Deadlines for each CEC chair need to be included such as financial statements, Chapter Recognition Program (CRP), and newsletter dates.

### AGA-KC 60<sup>th</sup> Anniversary Celebration

The CEC is identifying all the past presidents of the AGA-KC chapter.

An evening social event which spouses can attend is being discussed to celebrate this event.

### Social Media Sites:

Leeanna will make a Facebook AGA-KC group and Chuck will make an AGA-KC LinkedIn page.

The goal of these social media sites is to attract early career members.

## Chapter Executive Committee (CEC) Quarterly Meeting- January 11, 2012

### Spring Seminar:

The Spring Seminar will be held on April 19, 2012 at Johnson County Community College.  
Leeanna will email a draft seminar speaker template to the CEC.

### Treasurer:

Rhonda has reviewed the credit card statements and is not concerned regarding the fees charged.  
Rhonda will send an email to the CEC with more details regarding interchange fees which charge additional costs.  
Action item is to review credit cards at the next CEC meeting.  
During January a Certificate of Deposit (CD) came due and was cashed out and \$7,200 was put in savings. The chapter is waiting to see how much money will be generated from the spring seminar to determine how to reallocate the CD money.  
Action item is to discuss the CD funds during the next CEC meeting.

### Professional Development Conference (PDC):

It will cost \$100 extra to enroll someone past the early enrollment date, but \$800 can be saved if the chapter only provides one registration scholarship.  
Motion was made to hold off on the second registration for the PDC and make the 1<sup>st</sup> (Mike's) until next CEC meeting based on funds availability.  
The hotel reservation for the second scholarship will be canceled after the next CEC meeting if not needed.  
The majority of CEC members voted to wait on paying for the second PDC registration until next CEC meeting.  
Action item to discuss the second PDC scholarship during the next CEC.

### CGFM:

Carla will be distributing a CGFM study survey.  
It was discussed to form a bi-weekly study group for the CGFM exam.  
Action item is to submit the survey to membership and discuss the results during the next CEC.

### Membership:

Barry cannot vote on financial decisions of the chapter or distribute financial information to chapter members.  
Connie has volunteered to submit financial information to chapter members.  
Barry will send all other information to chapter members.

Motion was made and seconded to adjourn the meeting. Motion approved unanimously.



**Treasurer's Report  
AGA Kansas City Chapter  
Statement of Receipts and Disbursements  
For Period Ending December 31, 2011**

*Bank Account Balance December 31, 2011*

Primary Share Acct	\$253.11
Signature Checking	\$4,351.22
6MTH Classic CD (Matures 1/13/12)	\$7,247.85
<b>Total Bank Balance</b>	<b>\$11,852.18</b>

Beginning Book Balance:

Book Balance November 30, 2011	\$12,006.70
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Receipts:

Interest Income:

Savings	\$2.04
Certificate of Deposit	\$3.44
<b>Total Interest</b>	<b>\$5.48</b>

Other Receipts:

Total Other Receipts	\$0.00
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<b>Total Receipts</b>	<b>\$5.48</b>
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Disbursements:

Credit Card fees	AHC fees	\$20.00
	Community Service - prizes	
Check #288	(Healy)	\$50.00
Check #290	Membership Scholarship (Cobb)	\$90.00

<b>Total Disbursements</b>	<b>\$160.00</b>
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<u>Net fund from Transactions/(Loss) for period</u>	<b>(\$154.52)</b>
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Ending Book Balance

<b>December 31, 2011</b>	<b>\$11,852.18</b>
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Less Petty Cash	(\$100.00)
Check #291	Surety Bond (\$137.00)
Check #292	Website (\$300.00)
Check #293	Speaker Gift for January Luncheon and SLMR (Logan) \$57.08
Check #294	SLMR (Smith) \$32.62
	AHC PDC registration for Mike Melloy, Pres (\$775.00)
	Deposit to Jack Stack - February Luncheon (\$250.00)
	January Luncheon (Grand Café) \$600.00
	AHC January Luncheon (Grand Café) \$235.00
	AHC January Luncheon (\$826.80)

<b>Adjusted Balance</b>	<b>\$10,388.08</b>
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## Chapter Executive Committee—Program Year 2011–2012

Position	Name	Work Phone	Email Address
President	Michael Melloy	816-823-2701	<a href="mailto:michael.melloy@gsa.gov">michael.melloy@gsa.gov</a>
President – Elect	Vacant		
Past President	Oscar Williams	816-997-6939	<a href="mailto:oscar.williams2@va.gov">oscar.williams2@va.gov</a>
Secretary	Carrie Miller	816-926-2853	<a href="mailto:carrie.miller@kcc.usda.gov">carrie.miller@kcc.usda.gov</a>
Treasurer	Rhonda Lucas	816-926-7935	<a href="mailto:rhonda.lucas@one.usda.gov">rhonda.lucas@one.usda.gov</a>
Awards	Michelle Holland	913-792-5310	<a href="mailto:michelle.holland@jocogov.org">michelle.holland@jocogov.org</a>
By-Laws / Procedures / Historian / Property	Mark Brandt	816-823-2938	<a href="mailto:mark.brandt@gsa.gov">mark.brandt@gsa.gov</a>
CGFM	Carla Kohler	913-551-7900	<a href="mailto:kohler.carla@epamail.epa.gov">kohler.carla@epamail.epa.gov</a>
Chapter Recognition	Michael Melloy	816-823-2701	<a href="mailto:michael.melloy@gsa.gov">michael.melloy@gsa.gov</a>
Communications – Newsletter	Howard Petrie	816-513-1172	<a href="mailto:howard.petrie@kcmo.org">howard.petrie@kcmo.org</a>
Community Service	Nancy Healy	913-551-7713	<a href="mailto:healy.nancy@epa.gov">healy.nancy@epa.gov</a>
Early Career	Harry E. Heflin	816- 942-5102	<a href="mailto:hheflin49@aol.com">hheflin49@aol.com</a>
Professional Development-Seminar Coordinator	Leeanna Wilder	913-551-7161	<a href="mailto:wilder.leeanna@epa.gov">wilder.leeanna@epa.gov</a>
Liaison for other Professional Organizations	Oscar Williams	816-997-6939	<a href="mailto:oscar.williams2@va.gov">oscar.williams2@va.gov</a>
Membership	Barry Owens	816-823-1593	<a href="mailto:owensbarryj@yahoo.com">owensbarryj@yahoo.com</a>
Program and Technical	Laura Logan	816-823-4530	<a href="mailto:laura.logan@kcc.usda.gov">laura.logan@kcc.usda.gov</a>
	Connie Smith	816-926-3646	<a href="mailto:constance.smith@kcc.usda.gov">constance.smith@kcc.usda.gov</a>
Publicity/Website	Chuck Koelsch	816-823-1196	<a href="mailto:chuck.koelsch@ocio.usda.gov">chuck.koelsch@ocio.usda.gov</a>
Website	Steven E. Bell	913-649-7461	<a href="mailto:SteveB019@aol.com">SteveB019@aol.com</a>